

EXHIBIT 3

A CENSUS OF JEWISH DAY SCHOOLS
IN THE UNITED STATES 2013-2014
Marvin Schick

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EXECUTIVE SUMMARY

This is the fourth census of Jewish day schools in the United States sponsored by The AVI CHAI Foundation. Conducted at five-year intervals, beginning with the 1998-99 school year, this research provides a clear picture of trends in the day school world over an extended period of time. Accordingly, this report presents enrollment data for the recently concluded 2013-14 school year, and it also provides an analysis of what has occurred in the day school world since 1998. The statistics included in this document were provided by every known Jewish day school in the U.S. They are not extrapolations. Although self-reporting may result in a small number of instances of schools exaggerating their enrollment, wherever possible what schools reported have been checked against governmental records and data available through local Boards of Jewish Education and Federations, the result being a high degree of confidence in the accuracy of the statistics that have been given to us by the schools.

NUMBER OF STUDENTS

There were nearly 255,000 students enrolled from the four-year old level through 12th grade in Jewish elementary and secondary schools in the 2013-14 school year. This represents an increase of 27,000 students or 12% since the previous census and 37% since 1998. In 1998-99 there had been 184,000 day-schoolers. In the span of 15 years, enrollment has grown by 70,000 students. This is an impressive rate of growth, yet just about all of it is attributable to increased enrollment in Charedi schools, primarily in the Chassidic sector but also in Yeshiva World schools. It is certainly a challenge to provide the classrooms to accommodate so many additional students and also to raise the funds necessary to meet the attendant increase in the operating deficit of so many schools.

It is likely that this growth rate will continue over the next five years, so that within a short period total day school enrollment will reach 300,000 students.

THE NUMBER OF SCHOOLS AND SCHOOL SIZE

There were 861 day schools in 2013-14, significantly above the 802 schools reported in the previous census. In 1998-99, the number was 676. More than half of this increase is in the Yeshiva World sector, where at the high school level for boys there is a strong preference to have small schools with but one class per grade. There were also meaningful increases in the number of Chabad and Community (RAVSAC) schools, as well as in the Chassidic sector where the tendency is to have large institutions. If we divide the number of students by the number of schools, the average per school is 296 students. When the Charedi schools are excluded from this reckoning, the average is 239 students per school, which is quite small by American educational standards.

Smallness is embedded in the Jewish day school world, the inevitable consequence of geographic and denominational diversity. For each of the four censuses, approximately 40% of day schools have fewer than 100 students. Smallness is self-perpetuating because a small school has

a limited curriculum and limited facilities, and this feeds the perception in homes of marginal religiosity that it is preferable to send their children to public schools that are tuition-free and have a substantially wider range of educational offerings and extra-curricular activities.

ENROLLMENT BY AFFILIATION

Day schools mirror our religious diversity. There are three categories of non-Orthodox schools: Reform, Solomon Schechter (Conservative) and Community. These schools now constitute but 13% of all day school enrollment, down from 20% in 1998. Reform schools constitute 1.5% of all enrollment. There has been a sharp decline in the number of Solomon Schechters and in enrollment in these schools, mirroring the difficulties now confronting this movement. There were 39 Solomon Schechters in 2013, down from 63 in 1998. In this span enrollment declined by 45%, from 17,700 to 9,700. Community schools have fared well, increasing in number in the same period from 75 to 97 and in enrollment from nearly 15,000 students to 20,500 students. Increasingly, RAVSAK has emerged as the key day school address for schools that are not within the ambit of the National Society of Hebrew Day Schools – Torah Umesorah.

As is well known, there is much diversity among the Orthodox. At the educational level, there are five primary categories for Orthodox day school enrollment: Modern Orthodox, Centrist Orthodox, Yeshiva World, Chassidic and Chabad. In addition, there are Immigrant/Outreach schools that are under Orthodox sponsorship, although their students come overwhelmingly from non-Orthodox homes. The Special Education schools that serve our community are all under Orthodox sponsorship. The pattern is complicated by the changing character of some schools. There are Modern Orthodox schools that have become more modern and there are Modern Orthodox schools that have become Centrist in orientation. A further complication arises from the establishment of blended learning schools that combine traditional classroom and online education. All are Orthodox

in affiliation. There is a growing number of Montessori schools, most but not all Orthodox in orientation.

Enrollment in Modern Orthodox schools scarcely changed between 1998 and 2013. There was a modest decline in Centrist Orthodox enrollment. Yeshiva World and Chassidic schools' enrollment has grown dramatically, by nearly 60% in the former category and 110% in Chassidic schools. This growth in the two fervently Orthodox sectors is attributable to high fertility. These two categories now constitute 60% of all day school enrollment.

There has been significant growth in the Chabad network, from 44 schools in 1998 to 80 schools in 2013, with a commensurate growth in enrollment. These schools tend to have low enrollment, as many now serve small Jewish communities. There has been a steep decline in the number of students in Immigrant/Outreach schools, arising from the sharp decline in immigration from the Former Soviet Union. In addition, these schools no longer attract much communal attention.

THE GEOGRAPHIC FACTOR

There are Jewish day schools in 37 states and the District of Columbia. In ten of these states, enrollment is below 100, and in 16 states, over the course of the four censuses there has been a decline in the number of students. Enrollment has held up in California, Florida, Georgia, Maryland, Michigan and Texas.

New York and New Jersey are, to a great extent, the center of the day school world. Between 1998 and 2013, enrollment in New York day schools grew by 47,000 or by 45%. In New Jersey, the number grew by nearly 21,000 or by 116%. Nearly all of New Jersey's growth is attributable to Lakewood. Over the 15 year span of these censuses, Lakewood day school enrollment has risen from 5,300 to 23,600. All told, New York and New Jersey had 190,000 day-schoolers in 2013.

Outside of these two states, day school enrollment has been essentially stable over the years.

TABLE 10: LAKEWOOD ENROLLMENT

									Change in # of Students 1998-2013	Percentage
Schools	Students	Schools	Students	Schools	Students	Schools	Students			
	1998		2003		2008		2013			
Centrist Orthodox	-	-	1	112	1	91	-	-	-	-
Chassidic	2	464	1	200	2	703	10	2,527	2,063	444.61%
Modern Orthodox	1	119	-	-	-	-	-	-	-	-
Solomon Schechter	1	119	-	-	-	46	-	-	-	-
Special Education	-	-	1	109	1	201	3	287	-	-
Yeshiva	16	4,613	33	8,528	51	13,779	70	20,815	16,202	351.22%
Total	20	5,315	36	8,949	55	14,820	83	23,629	18,314	344.57%

about 2,200 students, or more than 60%. In 2013, there were 15 more Chabad day schools than operated in 1998. The statistics also provide a sense of the relative smallness of Chabad schools. There were an equal number of Chabad and Modern Orthodox schools, but the latter category had many more students.

Although New York and New Jersey are the center of the Yeshiva World, in most major cities there are schools in this category, and they have fared well over the 15-year period. Enrollment has grown by nearly 5,000 or more than 50% and there are now 75 schools so identified, up from 44 15 years ago. It should be noted once more that quite a few of these Yeshiva World schools are at the high school level and are small.

Between 2008 and 2013, day schools outside of New York and New Jersey lost a bit more than 2,000 students, with all of the loss and then some attributable to non-Orthodox schools. In 2008, these schools had 31,663 students. Five years later, they had 27,749 students, representing a loss of nearly 4,000 students. In the same period, enrollment in Orthodox schools grew by about 1,600 students. Put otherwise, while in 2008 Orthodox enrollment outside of New York and New Jersey was 52.7% of the total, by 2013 the proportion had grown to 57% of the total.

The decline in non-Orthodox enrollment is reflective, at least to an extent, of changes in Jewish communal life in

many localities across the country. Simply put, there are fewer children in non-Orthodox homes whose parents are determined to send them to a Jewish day school.

Especially away from New York and New Jersey, enrollment of children from non-Orthodox homes in day schools cannot be calculated simply by adding the number of students in schools identified as non-Orthodox. For one thing, the likelihood is that away from New York, there is a greater tendency for non-Orthodox parents to send their children to an Orthodox school, and there obviously is a collateral greater tendency for Orthodox schools to accept such students. Secondly, Chabad school enrollment outside of New York and New Jersey has grown from census to census, and a large number of enrollees in these Chabad schools are from non-Orthodox homes.

NEW YORK AND NEW JERSEY

The flip side of what may be referred to as stagnant enrollment outside of New York and New Jersey is the spectacular growth in these two states. Between 1998 and 2013, enrollment in New York day schools grew by more than 47,000 or by 45% and, in New Jersey, the number grew by nearly 21,000 or by 116%. Put otherwise, since total enrollment in U.S. day schools has grown by 70,000 over the 15-year period, nearly all of this growth has been in these two states. Furthermore, nearly all of the growth

TABLE 11: NYC ENROLLMENT

	Schools	Students	Schools	Students	Schools	Students	Schools	Students
	1998		2003		2008		2013	
Bronx	4	1,039	5	1,347	4	1,608	4	1,805
Brooklyn	160	61,967	179	67,777	180	76,840	196	87,707
Manhattan	15	3,881	14	4,326	13	4,354	13	4,733
Queens	30	7,725	31	8,285	32	9,618	30	10,964
Staten Island	5	926	6	828	6	854	7	1,027
Total	214	75,538	235	82,563	235	93,274	250	106,236

in these two states is attributable to increased enrollment in Chassidic and Yeshiva World schools.

In raw numbers, New York and New Jersey had 190,000 dayschoolers in 2013. As this report is being issued early in the 2014-15 school year, the figure has already grown by at least 6,000, so that in another blink of the eye, these two states will account for 200,000 students. By 2018, when hopefully another day school census will be conducted, enrollment in these two states is likely to reach 225,000 students. The financial challenges facing the geographic communities and also the religious communities that sustain these institutions is enormous, and the challenge is made even greater by the necessity to create additional facilities to accommodate the remarkable growth.

Nearly all of the additional students over the past five years in New Jersey schools are attributable to the sensational growth of yeshivas and day schools in Lakewood, New Jersey, a relatively small municipality that is home to Beth Medrash Govoha, the largest advanced yeshiva in the world, with an enrollment of 7,000 seminary students. As Table 10 on page 28 shows, in 2008 there were nearly 15,000 students in Lakewood schools, while in 2013 there were more than 23,600 students. Over the 15-year span of these censuses, Lakewood day school enrollment has risen from 5,300 to 23,600, a growth rate of 344%.

Put otherwise, enrollment in Lakewood Jewish elementary schools and high schools now grows by about 1,800 students a year. Each year, that number of additional seats must be created, and each year it is necessary to sustain on an

operating basis a growing number of schools. In the 2013 school year, there were 83 schools operating at these levels. The number grows by between five and ten schools each year.

In the 2014-15 school year, the Jewish elementary schools and high schools in Lakewood will enroll more students than are enrolled in all of the Jewish day schools in Illinois, Maryland, Massachusetts, Michigan, Ohio and Pennsylvania combined, states with major cities and suburban areas that have large Jewish communities and a significant Orthodox Jewish presence.²⁷

Although New York City schools have not grown in enrollment anywhere close to the Lakewood experience, their statistics are quite impressive. As Table 11 (above) shows, between 1998 and 2013 there was an increase of about 30,000 students. This growth rate of nearly 40% came during a period of significant movement out of the city of mainly young Orthodox families, many to the Five Towns area in Nassau County or to Rockland County. Another migration resulted from the development and growth of Kiryas Joel, the large Satmar community in Orange County, New York. As already described, a perhaps even greater number of young

²⁷ The Lakewood story is even more remarkable when we consider two additional factors. The first is enrollment in post-high school institutions or seminaries. Mention has been made in the text of Beth Medrash Govoha. In addition to that very large institution, there are nearly 50 schools for male students operating at the post-high school level in Lakewood. There are, of course, a number of post-high school seminaries for girls.

A perhaps even more remarkable statistic is that Lakewood itself is a small community. According to the 2010 U.S. Census, Lakewood's population was 54,000, of whom 48.4% were under the age of 18. Is there another locality in the country with such a statistic?

TABLE 12: NYC BY CATEGORY, 1998-2013

Classification	1998			2003		
	Schools	Students	% of Total	Schools	Students	% of Total
Orthodox						
Centrist Orthodox	25	6,313	8.36%	21	4,763	5.77%
Chabad	6	3,609	4.78%	11	4,225	5.12%
Chassidic	61	27,983	37.04%	70	32,909	39.86%
Immigrant/Outreach	22	4,130	5.47%	24	3,993	4.84%
Modern Orthodox	11	6,694	8.86%	11	8,052	9.75%
Special Education	8	276	0.37%	19	668	0.81%
Yeshiva	71	24,584	32.55%	70	25,686	31.11%
Orthodox Total	204	73,589	97.45%	226	80,296	97.25%
Non-Orthodox						
Community	4	785	1.04%	4	949	1.15%
Reform	1	357	0.47%	1	506	0.61%
Solomon Schechter	5	807	1.07%	4	812	0.98%
Non-Orthodox Total	10	1,949	2.55%	9	2,267	2.75%
NYC Total	214	75,538		235	82,563	

Orthodox families have settled in Lakewood, New Jersey. Overwhelmingly, this movement away from the city came from families that previously lived in Brooklyn, which makes even more impressive the growth in enrollment in that part of New York City. Between 1998 and 2014, Brooklyn enrollment grew by 26,000 students, so that about 80% of all New York City Jewish day school enrollment growth is attributable to Brooklyn. Interestingly, the increase in the number of Jewish day schools in Brooklyn has not mirrored the enrollment increase. The obvious explanation is that in the aggregate, Brooklyn schools are larger today than they were in 1998.²⁸

Table 12 provides New York City enrollment by school category for each of the censuses. Only one in 40 Jewish dayschoolers in the city is in a non-Orthodox school. Presently, there are only nine such schools in New York City. Of note, the non-Orthodox school share of day school enrollment in the city has been constant. In 1998, it was 2.55%; in 2013, it was 2.52%. As there has been a constant

increase in the number of students in Jewish day schools in the city, obviously there has been a commensurate increase in non-Orthodox school enrollment. All of this increase – and then some – has been in the Community school sector.

As for the Orthodox, nearly half of the enrollment is in Chassidic schools and more than a quarter is in Yeshiva World institutions. By far the lion's share of the growth in New York City day school enrollment has been in Chassidic schools. There has been a nearly 90% increase since 1998. In the same period, the Yeshiva World enrollment grew by 16%.

Unlike Lakewood, which has significant tracts of land that can readily be developed for school use, Brooklyn is densely populated, especially in the neighborhoods with large concentrations of Orthodox Jews. It is a constant challenge to find space to accommodate enrollment growth. Whereas Yeshiva World schools in Brooklyn tend to be in the heart of the neighborhoods where their families live, Chassidic groups are willing to build facilities at the edge of their neighborhoods and even in neighborhoods that have few or no Chassidim. For instance, there are now Satmar schools in Brooklyn in Bedford Stuyvesant. What often happens is that after a Chassidic

²⁸ Enrollment in Kiryas Joel schools amounts to about 11,000. Each of the students can be said to be in families that moved from Brooklyn.

2008			2013		
Schools	Students	% of Total	Schools	Students	% of Total
19	4,727	5.07%	18	4,901	4.61%
17	6,345	6.80%	18	5,680	5.35%
72	40,239	43.14%	83	52,063	49.01%
18	2,781	2.98%	13	1,853	1.74%
13	9,255	9.92%	13	9,465	8.91%
14	849	0.91%	17	1,051	0.99%
75	26,711	28.64%	79	28,541	26.87%
228	90,907	97.46%	241	103,554	97.48%
4	1,240	1.33%	5	1,454	1.37%
1	567	0.61%	1	516	0.49%
2	560	0.60%	3	712	0.67%
7	2,367	2.54%	9	2,682	2.52%
235	93,274		250	106,236	

school is planted in a non-Chassidic neighborhood, Chassidic families begin to move in. This has already happened in a significant portion of Bedford Stuyvesant.

Table 12 (above) shows that Modern Orthodox and Chabad schools have more than held their own over the 15-year period. Centrist Orthodox and Immigrant/Outreach schools have not. The enrollment decline in Immigrant/Outreach schools reflects the declining interest in educational institutions with an outreach mission. As for Centrist Orthodox schools, their enrollment decline likely arises from a shift to the suburbs of Centrist Orthodox families, as well as a greater tendency to enroll their children in Yeshiva World schools.

Table 13 on pages 32-33 provides data for what is commonly referred to as the nine-county New York Metropolitan area, plus Orange County, which is a bit further north and includes Kiryas Joel, the large and rapidly-expanding Satmar community. The four additional counties outside of New York City have 32,500 Jewish dayschoolers, the large majority coming from Rockland County, which has for decades been a primary place of Charedi settlement. If we add enrollment in Kiryas Joel schools,

the total comes to about 150,000 students, or nearly 60% of all day school enrollment in the United States.

Demography is a tricky field, and many predictions about population patterns have turned out to be mistaken. But there are reasons to believe that the population trends indicated in Tables 10-13 on pages 28 to 33 are almost certain to continue, which is to say that in five years, not only will there be more students in Lakewood schools, New York City schools and in the counties near New York City than there are now, but also that there will be a further significant increase in the proportion of all U.S. Jewish day-schoolers being educated in these localities.

The financial implications for schools in the New York Metropolitan area and Lakewood are obvious. There will be capital needs in the tens of millions of dollars over the next decade, and the operating deficits of many schools will increase. The implications away from New York and New Jersey are more serious because they concern not only what may happen to the schools themselves, some of which will close because of declining enrollment, but at least as importantly, the impact on the communities where these schools are located.

TABLE 13: NYC, NASSAU, SUFFOLK, WESTCHESTER, ROCKLAND & ORANGE COUNTY ENROLLMENT, 1998-2013

Classification	1998					
	NYC		Suburban NYC		Total	
	Schools	Students	Schools	Students	Schools	Students
Centrist Orthodox	25	6,313	10	3,034	35	9,347
Chabad	6	3,609	2	73	8	3,682
Chassidic	61	27,983	17	10,357	78	38,340
Community	4	785	0	0	4	785
Immigrant/Outreach	22	4,130	1	40	23	4,170
Modern Orthodox	11	6,694	9	4,369	20	11,063
Reform	1	357	0	0	1	357
Solomon Schechter	5	807	7	2,248	12	3,055
Special Education	8	276	4	150	12	426
Yeshiva	71	24,584	27	6,477	98	31,061
Total	214	75,538	77	26,748	291	102,286

Classification	2008					
	NYC		Suburban NYC		Total	
	Schools	Students	Schools	Students	Schools	Students
Centrist Orthodox	19	4,727	6	3,108	25	7,835
Chabad	17	6,345	10	753	27	7,098
Chassidic	72	40,239	26	18,891	98	59,130
Community	4	1,240	0	0	4	1,240
Immigrant/Outreach	18	2,781	0	0	18	2,781
Modern Orthodox	13	9,255	7	3,709	20	12,964
Reform	1	567	0	0	1	567
Solomon Schechter	2	560	4	2,097	6	2,657
Special Education	14	849	6	373	20	1,222
Yeshiva	75	26,711	34	8,066	109	34,777
Total	235	93,274	93	36,997	328	130,271

2003					
NYC		Suburban NYC		Total	
Schools	Students	Schools	Students	Schools	Students
21	4,763	12	3,350	33	8,113
11	4,225	5	273	16	4,498
70	32,909	25	15,024	95	47,933
4	949	0	0	4	949
24	3,993	0	0	24	3,993
11	8,052	7	4,342	18	12,394
1	506	0	0	1	506
4	812	5	2,350	9	3,162
19	668	9	562	28	1,230
70	25,686	27	6,785	97	32,471
235	82,563	90	32,686	325	115,249

2013					
NYC		Suburban NYC		Total	
Schools	Students	Schools	Students	Schools	Students
18	4,901	9	3,669	27	8,570
18	5,680	8	717	26	6,397
83	52,063	38	26,446	121	78,509
5	1,454	2	134	7	1,588
13	1,853	0	0	13	1,853
13	9,465	6	3,203	19	12,668
1	516	0	0	1	516
3	712	2	1,053	5	1,765
17	1,051	5	368	22	1,419
79	28,541	34	7,524	113	36,065
250	106,236	104	43,114	347	149,350